

Job Aid:

Seller Administrator: Organization Maintenance

This Job Aid shows how to:

- Maintain company information

Of Special Note:

A Seller Administrator has the ability to maintain company information. It is the responsibility of the Seller Administrator to maintain the company's information and ensure that the information provided is true and accurate. The Seller Administrator also has the ability to edit the selection of commodity codes and to add and manage users, in addition to inactivating users who leave their role or organization.

Screenshot



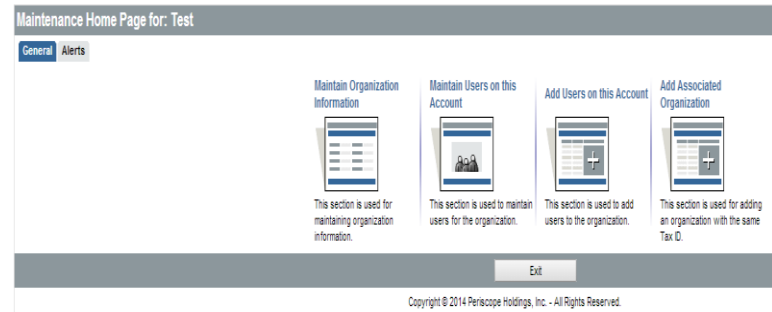
Directions

1. Launch the COMMBUYS website by entering the URL <https://www.commbuys.com/bsol/> into the Browser.

Login using your Login ID and password

2. This image displays the home page of a Seller Administrator. Select **Maintain Organization Information** to perform organization maintenance.

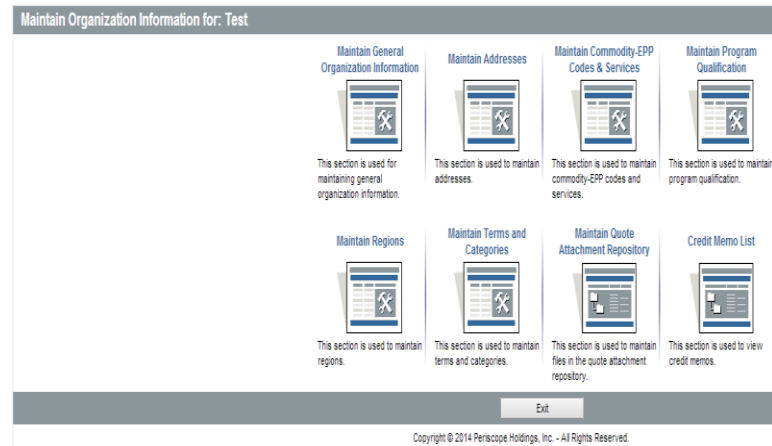
Note: If you have both the seller roles, make sure you are in the **Seller Administrator** tab.



Job Aid:

Seller Administrator: Organization Maintenance

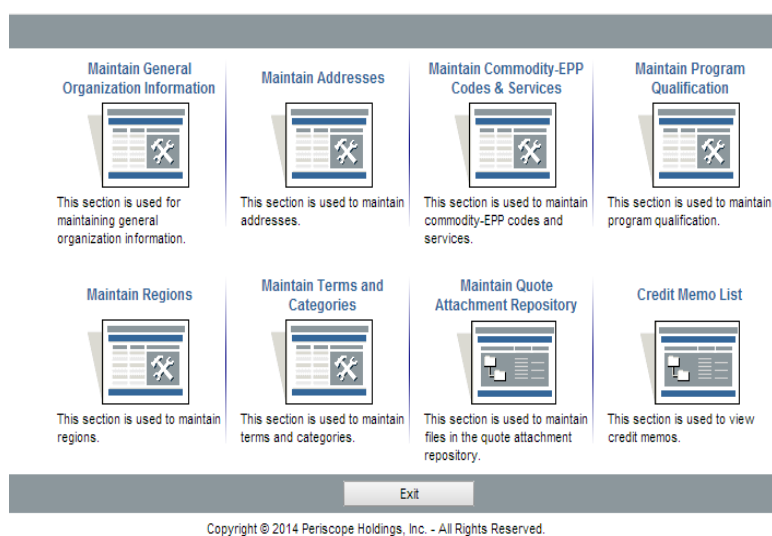
Screenshot



Directions

3. This screen will allow you to edit and or add information to maintain accurate records for your organization.

Note: The Commonwealth will not be using the Maintain Regions icon. Additionally, the Credit Memo List will not be used.

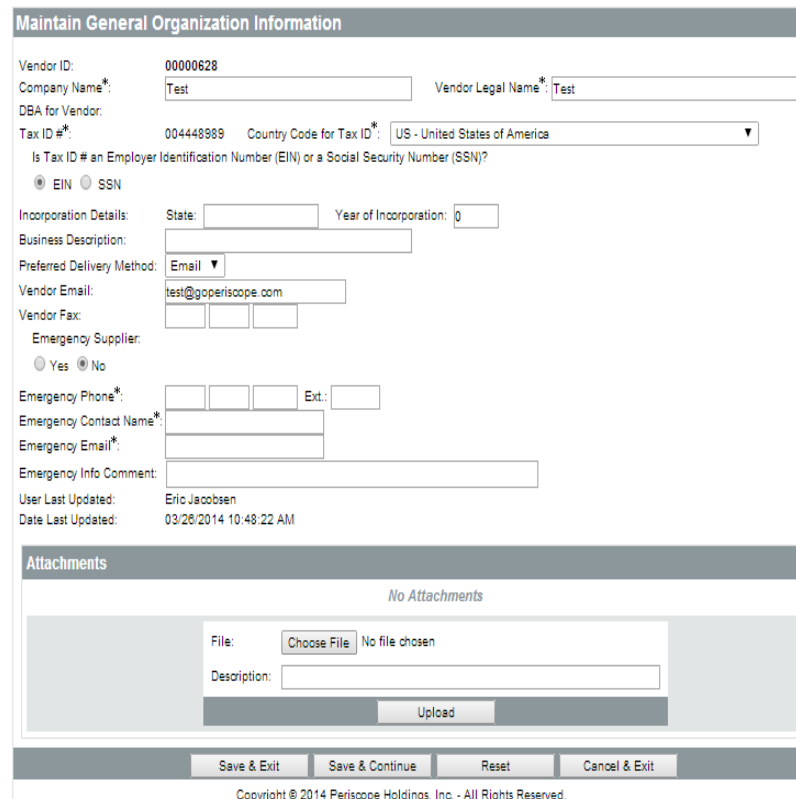


4. Select **Maintain General Organization Information** to maintain the organization's default information, including name, business description, emergency contacts and any attachments.

Job Aid:

Seller Administrator: Organization Maintenance

Screenshot



Maintain General Organization Information

Vendor ID: 00000628
 Company Name*: Test Vendor Legal Name*: Test
 DBA for Vendor:
 Tax ID #: 004448989 Country Code for Tax ID*: US - United States of America
 Is Tax ID # an Employer Identification Number (EIN) or a Social Security Number (SSN)?
☒ EIN ☐ SSN
 Incorporation Details: State: Year of Incorporation: 0
 Business Description:
 Preferred Delivery Method: Email
 Vendor Email: test@goperiscope.com
 Vendor Fax:
 Emergency Supplier:
☐ Yes ☒ No
 Emergency Phone*: Ext.:
 Emergency Contact Name*:
 Emergency Email*:
 Emergency Info Comment:
 User Last Updated: Eric Jacobsen
 Date Last Updated: 03/26/2014 10:48:22 AM

Attachments

No Attachments

File: Choose File No file chosen
 Description:
 Upload

Save & Exit Save & Continue Reset Cancel & Exit

Copyright © 2014 Periscope Holdings, Inc. - All Rights Reserved.

Directions

5. The **Maintain General Organization Information** page is where you manage your organization's general information.

Description of fields:

- **Vendor ID** – identifier of the current Vendor record; non-editable field
- **Company Name** – required; enter or modify the Vendor company name
- **Vendor Legal Name** – required; enter or modify the Vendor's legal name
- **Tax ID#** – required; cannot modify
 - **Is Tax ID # an Employer, Identification Number (EIN) or a Social Security Number (SSN)?** – choose the type of Tax ID when registering
- **Country Code for Tax ID** – designate Tax ID country
- **Incorporation Details** – the state and year of incorporation for the Vendor
- **Business Description** – short business description
- **Preferred delivery method** – Vendor's preferred notification method (drop down)
- **Vendor Email** – required
- **Vendor Fax** – not required
- **Emergency Supplier** – if yes, complete the other emergency fields

On the bottom of the Maintain General Organization screen, you have the ability to add an attachment to the Vendor's profile.

Click **Choose File** to add an attachment then enter a description and check confidential if applicable.

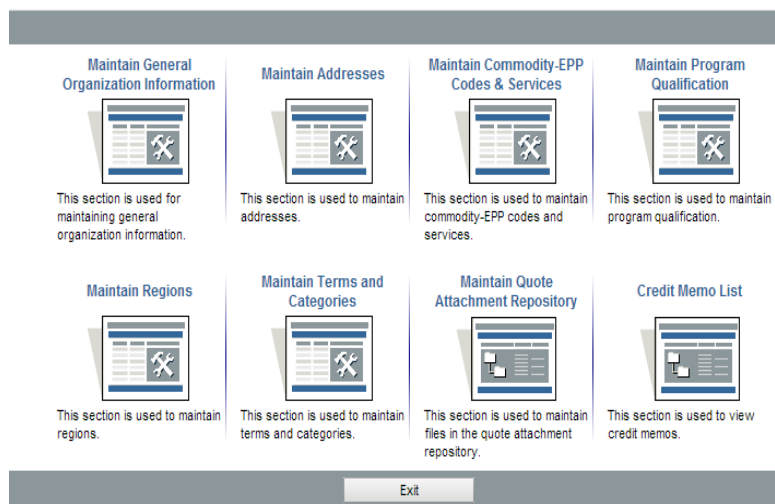
Click **Upload** to finalize the attachment.

Click **Save & Exit** to save updates and return to the Maintain Organization Information.

Job Aid:

Seller Administrator: Organization Maintenance

Screenshot



Directions

6. Next, select the **Maintain Addresses** icon on the Maintain Information homepage.

7. Add or edit vendor addresses on this page.

Note: If you see the word Edit in the Name column, please click the Edit to open a detailed view of your organization's address and update the "Name this Address" field

Click the **Add Another Address** button to add a new address.

8. An organization can have as many addresses as needed, but each address type is required to have a default.

There are five address types to choose from:

- **Bid Mailing Address**
- **Emergency Mailing Address**
- **Purchase Order Mailing Address**
- **Remit Address**
- **Sales Address**

Required address fields are marked with an *.

By default the address is marked **Active**, but other options include:

- **Inactive**
- **Deleted**
- **Locked**
- **Pending**

However, if only one address has been entered, only Active is available as a selection.

When complete, click **Save & Exit**.

Maintain Addresses for: Test

Name	Address Type	Address Information	Status	Default for Type
General	General Mailing Address	Eric Jacobsen tst mayberry rd, GA 00001 US Email: test@goperiscope.com Phone: (555)555-5555	Active	Yes

[Add Another Address](#) [Exit](#)

Enter a New Address

Address Type:

Name this Address*:

Contact Name*:

Address Line 1*:

Address Line 2:

Address Line 3:

Address Line 4:

Country*:

City*:

State/Province*:

ZIP*:

County:

Phone*:

Toll Free:

Exit:

Fax:

Mobile:

Email*:

Id:

Alternate Id:

Status:

Web Address:

☒ Default address for this address type (Begin with http:// or https://)

[Save & Exit](#) [Reset](#) [Cancel & Exit](#)

Job Aid:

Seller Administrator: Organization Maintenance

Screenshot

Directions

Address Book - Test

General Mailing Address

Name this Address*:	General		
Contact Name*:	Eric Jacobsen		
Address Line 1*:	1st		
Address Line 2:			
Address Line 3:			
Address Line 4:			
Country*:	US - United States of America ▼		
City*:	mayberry rfd	State/Province*:	GA
ZIP*:	00001	County:	
Phone*:	555 555 5555	Ext:	
Toll Free:		Mobile:	
Fax:		Email*:	test@goperiscope.com
Id:	2472	Alternate Id:	
Status:	Active ▼	Web Address:	
<input checked="" type="checkbox"/> Default address for this address type (Begin with http:// or https://)			

Save & Exit Save & Continue Reset Cancel & Exit

Copyright © 2014 Periscope Holdings, Inc. - All Rights Reserved.

9. To edit a Vendor's address, click the hyperlinked name to open the address information (seen on step 7). Edit the information as desired.

When complete, click **Save & Exit**.

10. Select the **Maintain Commodity-EPP Codes & Services** icon on the Maintain Information homepage.

Maintain General Organization Information



This section is used for maintaining general organization information.

Maintain Addresses



This section is used to maintain addresses.

Maintain Commodity-EPP Codes & Services



This section is used to maintain commodity-EPP codes and services.

Maintain Program Qualification



This section is used to maintain program qualification.

Maintain Regions



This section is used to maintain regions.

Maintain Terms and Categories



This section is used to maintain terms and categories.

Maintain Quote Attachment Repository



This section is used to maintain files in the quote attachment repository.

Credit Memo List



This section is used to view credit memos.

Exit

Copyright © 2014 Periscope Holdings, Inc. - All Rights Reserved.

11. Select the **Maintain Commodity – EPPs** icon to add or inactivate commodity codes for the Vendor profile.

Maintain Commodity-EPPs

This section is used to add or remove commodity-EPPs.



Display Inactive Commodity-EPP

This section is used to display inactive commodity-EPPs.



Exit

Job Aid:

Seller Administrator: Organization Maintenance

Screenshot

Commodity-EPP and Service Codes

Current Codes - Test

Deactivate	Code	Description	Date Added
<input type="checkbox"/>	10-10-15	Livestock	03/28/2014

Deactivate Selected Items Add Additional Codes Cancel & Exit

Copyright © 2014 Periscope Holdings, Inc. - All Rights Reserved.

Directions

12. All Vendors must have at least one UNSPSC code associated with their Vendor profile.

Click the **Add Additional Codes** button to add codes.

Search

UNSPSC Segment-Family

UNSPSC Class

UNSPSC Keyword

Search using

Search

Use the Code Search Engine if you are familiar with the code. If not use the Code Browse below.

UNSPSC Code Browse

Select the category that best describes the product and service you offer. Click on the question mark for more information.

10	Live Plant and Animal Material and Accessories and Supplies
11	Mineral and Textile and Inedible Plant and Animal Materials
12	Chemicals including Bio Chemicals and Gas Materials
13	Resin and Rosin and Rubber and Foam and Film and Elastomeric

13. Search by Class, Item, and/or Keyword to find the UNSPSC code(s) to assign to the Vendor.

You can also click through the hyperlinked codes listed to open further detailed UNSPSC segment numbers.

UNSPSC codes determine which bid notifications you will receive; therefore select all possible codes to cast the widest net.

Overall Validation Warnings

- NIGP Code is required, please select at least one.

Search

UNSPSC Segment-Family

UNSPSC Class

UNSPSC Keyword

Search using

Search

Use the Code Search Engine if you are familiar with the code. If not use the Code Browse below.

UNSPSC Code Browse

Select the category that best describes the product and service you offer. Click on the question mark for more information.

Code	Description
<input checked="" type="checkbox"/> 10-20-15	Live blue or lavender or purple rose bushes
<input checked="" type="checkbox"/> 10-20-16	Live chocolate or brown rose bushes
<input checked="" type="checkbox"/> 10-20-17	Live cream rose bushes
<input checked="" type="checkbox"/> 10-20-18	Live green or lime rose bushes
<input checked="" type="checkbox"/> 10-20-19	Live light pink rose bushes
<input checked="" type="checkbox"/> 10-20-20	Live multi-colored pink rose bushes
<input checked="" type="checkbox"/> 10-20-21	Live orange rose bushes
<input checked="" type="checkbox"/> 10-20-22	Live peach rose bushes
<input checked="" type="checkbox"/> 10-20-23	Live pink rose bushes
<input checked="" type="checkbox"/> 10-20-24	Live red or burgundy rose bushes
<input checked="" type="checkbox"/> 10-20-25	Live sweetheart rose bushes
<input checked="" type="checkbox"/> 10-20-26	Live white rose bushes
<input checked="" type="checkbox"/> 10-20-27	Live yellow rose bushes
<input checked="" type="checkbox"/> 10-20-28	Live spray rose bushes

Save Save and Add More

Copyright © 2014 Periscope Holdings, Inc. - All Rights Reserved.

14. Select all the possible codes and click **Save** at the bottom of the screen.

Save and Add More can be used to continue to another UNSPSC search.

Job Aid:

Seller Administrator: Organization Maintenance

Screenshot

Directions

15. Once saved, the codes will appear as current codes.

To deactivate (remove) codes, check the **Deactivate** box next to the code you wish to remove and then click **Deactivate Selected Items**.

To add more codes click **Add Additional Codes**.

Click **Cancel & Exit** when commodity code maintenance is complete.

16. Select **Display Inactive Commodity Codes** from the Commodity Maintenance homepage.

This displays a list of commodity codes that were at active at one time for the vendor.

17. To reactivate commodity codes that have been deactivated, simply place a check mark in the item's Activate box and click **Save & Exit**.

Commodity-EPP and Service Codes

Current Codes - Test

Deactivate	Code	Description	Date Added
<input type="checkbox"/>	10-10-15	Livestock	03/26/2014
<input type="checkbox"/>	25-10-00	Motor vehicles	08/15/2014
<input type="checkbox"/>	25-10-15	Passenger motor vehicles	08/15/2014
<input type="checkbox"/>	25-10-16	Product and material transport vehicles	08/15/2014
<input type="checkbox"/>	25-10-17	Safety and rescue vehicles	08/15/2014
<input type="checkbox"/>	25-10-18	Motorized cycles	08/15/2014
<input type="checkbox"/>	25-10-19	Specialized and recreational vehicles	08/15/2014
<input type="checkbox"/>	25-10-20	War vehicles	08/15/2014
<input type="checkbox"/>	25-10-21	Truck tractors	08/15/2014

Deactivate Selected Items Add Additional Codes Cancel & Exit

Copyright © 2014 Periscope Holdings, Inc. - All Rights Reserved.



Commodity-EPP and Service Codes

Inactive Codes for Test

Activate	Code	Description	User Last Updated	Deactivated Date
<input type="checkbox"/>	25-10-18	Motorized cycles	TESTER1	08/15/2014
<input type="checkbox"/>	25-10-19	Specialized and recreational vehicles	TESTER1	08/15/2014
<input type="checkbox"/>	25-10-20	War vehicles	TESTER1	08/15/2014
<input type="checkbox"/>	25-10-21	Truck tractors	TESTER1	08/15/2014

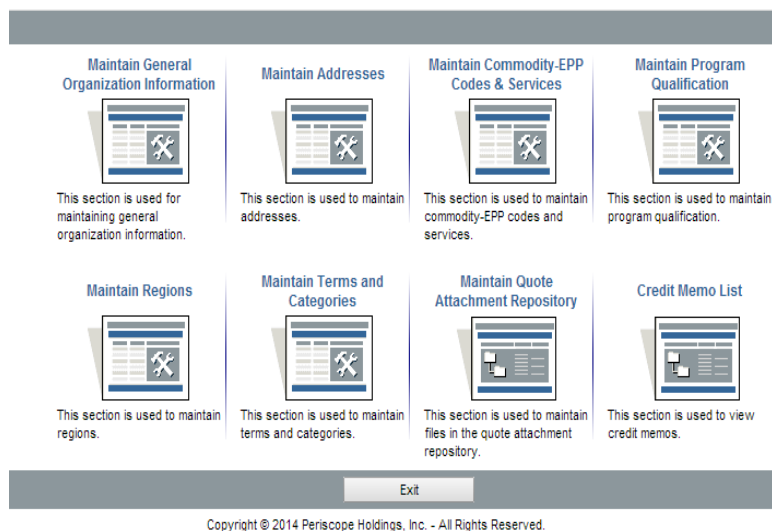
Save & Exit Save & Continue Exit

Copyright © 2014 Periscope Holdings, Inc. - All Rights Reserved.

Job Aid:

Seller Administrator: Organization Maintenance

Screenshot



Directions

18. Next, select the **Maintain Terms and Categories** icon on the Maintain Information homepage.

Terms, Categories, and Certifications - Test

Terms

Categories & Certifications

Category: DUNS Number

Please select at most one category value

Select

☒ This is the DUNS number assigned to my Business

Notes:

not a real vendor

Category: Environmentally Preferable Product

Description: Does your company sell environmentally preferable products or services (EPP)? EPPs are products and services that have a lesser or reduced effect on human health and the environment when compared to competing products or services that serve the same purpose. They may include, but not be limited to items that contain recycled materials, minimal waste and conserve energy and/or water and reduce the amount of toxic substances disposed or consumed, protect open space or lessen the impact to public health. Category URL: <http://www.mass.gov/epp>

Please select at most one category value

Select

☒ No

☐ Yes

Notes:

Category: MBE Certified

Description: A check in "certified" indicates you are currently certified by the Massachusetts Supplier Diversity Office (SDO) as a Minority Business Enterprise (MBE). Note that, once your COMMBUYS registration is complete, your selection will be validated against the SDO Directory of Certified Businesses. The database is available for search at the following link. Category URL: <http://www.mass.gov/sdo>

☐ Not Certified

☐ Certified

Category: Prompt Pay Discount

Description: Does your company offer one or more Prompt Payment Discounts for receiving payments earlier than the procuring organization's standard payment terms?

Please select at most one category value

Select

☒ No

☐ Yes

19. Edit the terms and categories associated with your COMMBUYS account. Some categories cannot be self-selected as they require Commonwealth approval and will be selected internally by the Commonwealth.

To add a **Category** to the profile, check all the appropriate boxes and scroll to the bottom of the page.

Once you are finished click **Save & Exit**.

Categories – Categories are often used to identify businesses, for instance a minority owned or small business, so they will be searchable using this criterion.

Certifications – Certifications are agency-defined ways to verify and document Vendor compliance with categories. May include: licensing, insurance policy numbers, or any proof of compliance as determined by the agency

- If there is a certification available for a category, it will be available to add once a category is assigned and the changes saved.

Job Aid:

Seller Administrator: Organization Maintenance

Screenshot



Maintain Organization Information for Alyssa'a Place

Maintain General Organization Information
This section is used for maintaining general organization information.

Maintain Addresses
This section is used to maintain addresses.

Maintain Commodity-EPP Codes & Services
This section is used to maintain commodity-EPP codes and services.

Maintain Regions
This section is used to maintain regions.

Maintain Terms and Categories
This section is used to maintain terms and categories.

Maintain Quote Attachment Repository
This section is used to maintain files in the quote attachment repository.

Credit Memo List
This section is used to view credit memos.

Exit

Copyright © 2014 Periscope Holdings, Inc. - All Rights Reserved.

Directions

20. Next, select the **Maintain Quote Attachment Repository** icon on the Maintain Information homepage.

Attachments can be added as a file and/or as a folder to the repository. Once created this repository is viewable by the vendor users and buyers.



Attachment Repository

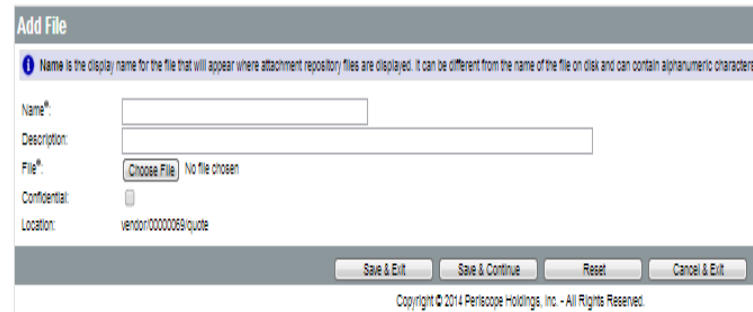
Repository Location: Repository

quote Add File | Create Folder
(empty)

Exit

Copyright © 2014 Periscope Holdings, Inc. - All Rights Reserved.

21. Click the **Add File** link.



Add File

Name is the display name for the file that will appear where attachment repository files are displayed. It can be different from the name of the file on disk and can contain alphanumeric characters

Name:

Description:

File: No file chosen

Confidential: ☐

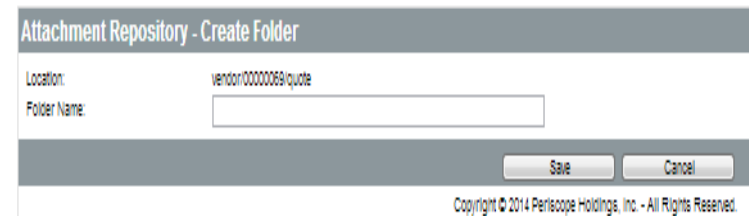
Location: vendor/00000069/quote

Save & Exit Save & Continue Reset Cancel & Exit

Copyright © 2014 Periscope Holdings, Inc. - All Rights Reserved.

22. Add a name, a brief description and browse to the file you wish to attach, and select **Save & Exit**.

The file will now be available for attachment when submitting quotes.



Attachment Repository - Create Folder

Location: vendor/00000069/quote

Folder Name:

Save Cancel

Copyright © 2014 Periscope Holdings, Inc. - All Rights Reserved.

23. To create a folder, click the **Create Folder** link seen on step 21.

Add the name of the folder to use for file storage and Click **Save**.

The new folder will now be available for file storage.